

State Procurement Office

**Overview of the SPO Website
and Posting Procurement Awards,
Notices and Solicitations**

Workshop SPO 140

**An overview of the SPO Website and the
systems for reporting/posting procurement
awards, notices and solicitations**

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Overview of the SPO website and Reporting Systems (SPO 140)

**Who this Workshop is For
And What it is Intended to Do**

- This workshop is designed for state personnel who:
 - Have written delegated procurement authority for any method of procurement; or
 - Are contract administrators; or
 - Have been delegated to post or report procurement notices, awards or solicitations for goods, services or health and human services; or
 - Assist in procuring (purchasing) goods, services, construction or health and human services; or
 - Are interested in learning about information and resources available on the SPO website.
- This workshop will:
 - Help you take advantage of the resources on the SPO website by demonstrating the kinds of information available to both procurement personnel and the public; and
 - Provide an overview of the reporting/posting systems such as procurement notices and awards.
- This workshop is not intended to:
 - Teach you everything you need to know about procurement or award procedure. (There isn't enough time.) You must take the appropriate workshops for the method of procurement you are conducting.
 - Serve in place of the handbooks/references SPO has produced and placed on the SPO website for reporting or posting procurement solicitations, notices, or awards. Should you need more detailed instruction on reporting/posting awards you may take SPO 141.

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SPO Website Overview and Reporting Systems (SPO 140)

What Will be Covered

- Housekeeping (about webinars)
- In General
 - Why we post all the information – Transparency.
 - General organization of the SPO website.
 - Where to find information.
 - Brief overview of agency reporting requirements.
- Posting:
 - Procurement Notices
 - Solicitations
 - Health and Human Services RFPs
 - HePS
 - Awards
 - Hawaii Compliance Express
 - Posting Awards
 - Posting professional Services Awards
- Q & A

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Clearing up the Mystery about Webinar Registration

Why Do I Need to Register in Two Different Places?

- Register first on the SPO training website.
 - Do not wait until the last minute - we have to send you an email invitation so you can accept the invitation; register NLT 3:00 PM the day prior
- Registering on the webinar site.
 - If you do not also register on the webinar site you will not receive the information telling you how to log in.
 - Webinar website registration takes just 2 or 3 minutes.
 - **Note:** In the near future this will be changing! Stay tuned!

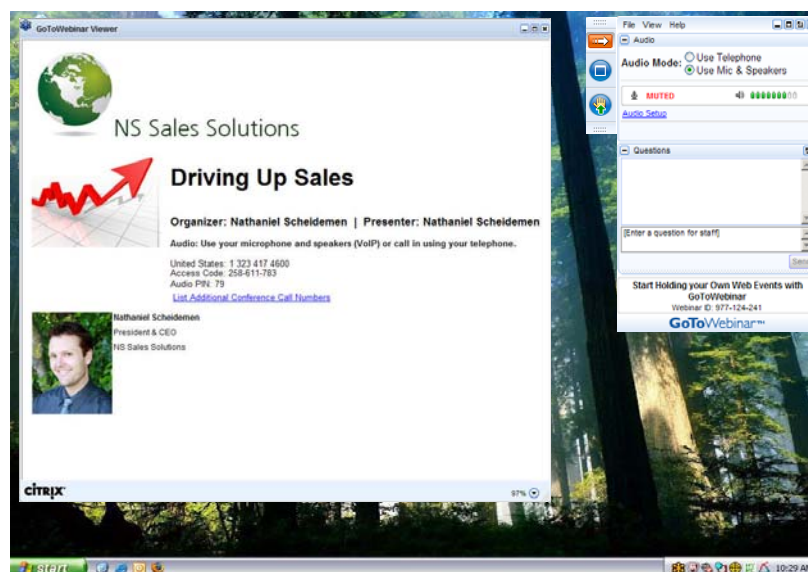
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About SPO Webinars

- Participation encouraged.
- If we cannot get to all your questions we will provide answers at a later date (FAQ, etc.)
- If there is more than one person participating at a single computer.
 - Make sure you registered for this webinar on the SPO Training website.
 - Be sure all attendees in the group (including the person registered on the webinar site) complete the SPO Webinar Group Attendance form, scan it in and send it to:
state.procurement.office@hawaii.gov
 - **Send it in within 1 working day of the webinar**
- The SPO Webinar Group Attendance form will be placed on the SPO training schedule along with the handouts on the day of the training..
<http://hawaii.gov/spo> click **Training for State and County Procurement Personnel**

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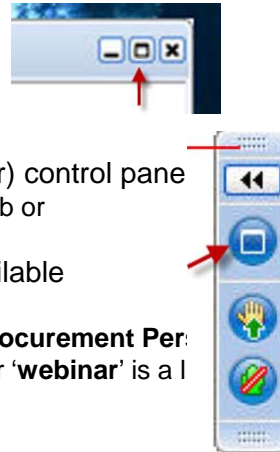
The GoToWebinar (GTW) Attendee View



citrix online

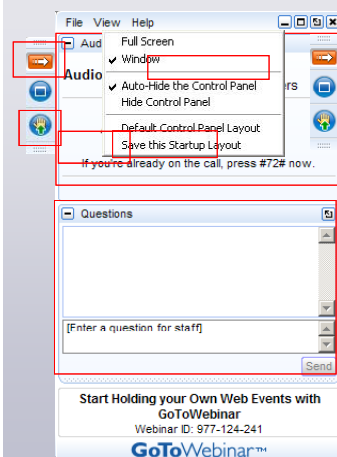
Webinar Viewer Window

- Having trouble seeing?
 - Maximize your viewer window; and/or
 - Increase the magnification in your viewer window (in lower right corner.)
- To exit full screen - GTW (GoToWebinar) control pane
 - click the button with the square on the tab or
 - View > window
- Note: Attendee Quick Reference is available
 - <http://hawaii.gov/spo>
 - Click **Training for State and County Procurement Per**
 - Click **About SPO Webinars** or wherever 'webinar' is a l
 - Click **FAQs and Quick Reference**



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How to Participate Today



- Open and close your Panel
- View, Select, and Test your audio
- Submit text questions
- Raise your hand
- Q&A addressed at the end of today's session

chpx online

More About SPO Webinars

- If you log in you may see a pop-up stating the presenter has not arrived yet. You do not need to do anything further. When the presenter arrives the appropriate screen will appear.
- This most often happens on the few occasions webinars are scheduled one right after another.

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Just a Reminder:

- This workshop does not cover everything required for reporting. It is an overview. Refer to:
 - Posting Procurement Awards, Notices & Solicitations
<http://hawaii.gov/spo> > For State and County Procurement Personnel > Posting Procurement Awards, Notices & Solicitations (PANS)
 - Hawaii Revised Statutes (HRS)
 - Hawaii Administrative Rules (HAR);
 - Procurement Circulars;
 - Manuals/Handbooks; and
 - Other workshops, as appropriate.

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Why We Post all this Information

We use taxpayer funds; Our “shareholders” are the taxpayers (everyone). Like the private sector, we want best value. As the public sector we have additional obligations:

1. We must be open/transparent.

- Everyone has a right to know and have easy access.

2. We must be fair to all qualified vendors.

- Everyone has the right to compete.

3. We ARE accountable.

- Keep an auditable trail. (document, document, document!)
- Follow standardized rules and procedures.
(Statutes, Administrative Rules, Procurement Circulars, Internal Procedures)

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Before You Procure/Administer Contract: Written Delegated Authority and Training

Before you develop/draft/participate in a solicitation, review, approve, conduct, manage, or administer a procurement/contract, you must:

- **Have written delegated authority per signed and submitted (to SPO) Form SPO-036.**
Note: There is a not-so-new Procurement Delegation Memorandum 2010-01. Informational sessions including a webinar were held for ASOs/BMOs and their staff. New forms were due 4/30/11. Previous delegation remained in place until 4/30/11 or new delegations received, whichever was first.
 - See : <http://hawaii.gov/spo>
 - > [For State & County Procurement Personnel](#)
 - > [Procurement Delegation](#) (there is also a link to the required (mandatory) training requirements site)
- **Have taken all required training.**
Reference: Procurement Circular 2010-05
Note: Some requirements have changed. Check the website periodically.
 - See: <http://hawaii.gov/spo>
 - > [Training for State and County Procurement Personnel](#)
 - > [Which Workshops Do I need to Take?](#)

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Required (Mandatory) Training

- You must also have taken all required training.
 - See <http://hawaii.gov/spo>
 - Training for State and County Procurement Personnel
 - [Required Training: Which Workshops Do I Need to Take?](#)
- Look for Method of Procurement you are going to conduct or in which you participate.
- Ensure you take all workshops with an M (Mandatory) before you procure/participate in a procurement.

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The SPO Website:

- <http://hawaii.gov/spo>
 - Bookmark this page.
 - Access all other SPO web pages from here.
 - When giving information to the public, always use the SPO homepage, followed by “click <link>”.
- For example:
<http://hawaii.gov/spo>
click **Procurement Notices**.
- **Why? Website addresses change.**

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Some Shortcuts in Instructions

- You may see instructions with a > between 2 links.
For example:
- <http://hawaii.gov/spo> > Training > Who registered
- The > means **click**
- **click *Training*, then click *Who registered***

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General Organization of the Website

More than one way to get to information.

Goal : make information easier to find.

- **Points of view**
 - Vendors, procurement personnel, legislators, advocates, etc.
- **Categories of information**
 - Reference (HAR, HRS, Procurement Circulars or Directives),
 - training materials (manuals, guides, FAQs, etc.)
- **Information based on function**
 - Solicitations, award, contracting
 - Method of procurement

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State Procurement Office
 Overview of the SPO Website and
 Posting Procurement Awards, Notices and Solicitations (SPO 140)

Methods of Procurement		
Method	Bases for Use	Bases of Award
Competitive Sealed Bids	Always used unless it is not feasible or practicable.	Lowest responsive, responsible bid.
Small Purchases	Purchases of smaller quantities for goods and services of less than \$100,000 and construction less than \$250,000. <i>(Per Act 175 SLH 2009, the cap returns to less than \$50,000 on 7/1/12)</i>	Lowest responsive, responsible quotation.
Competitive Sealed Proposals	Competitive sealed bidding is not practicable; price is not the most critical factor.	Based on RFP evaluation criteria.
Multi-step Bid	Used when pre-qualification of offerors necessary before considering price.	Lowest bidder of qualified offerors.
Sole Source	Only one source for the required good, service, or construction.	Approved single source at agreed prices.
Emergency	Used to respond the needs that are immediate and serious that are a threat to life, public health, welfare, or safety.	Lowest responsive and/or responsible offeror.
Professional Services	Professional services as defined in rules and statutes	Qualified respondent that meets determined criteria; prices are agreed to.
Request for Interest (For Federal Grants)	Used prior to applying for the Federal grants where time is limited or economic situations require a "quick" selection process.	Criteria determined in RFI. 17

SPO Website Logic

- **Points of view:**
 - State and County Procurement Personnel
 - [For State and County Procurement Personnel](#) (bookmark this page)
 - Vendors, Contractors and Service Providers
 - [Doing Business with the State](#)
- **Other (Function and/or Category):**
 - Goods, Services and Construction
 - Health and Human Services
 - HAR, HRS, Procurement Circulars
 - Procurement Notices, Solicitations
 - Awards and contracts

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PANS - Posting/Reporting Procurement Awards, Notices and Solicitations

- Each department head has appointed an Accounts Manager.
 - [List of delegated Accounts Managers](#) is on the SPO website)
- Accounts are assigned by the Accounts Mgr. One account for each division/ administratively attached office - developed by SPO.
 - Accounts Mgrs. (not individuals) may request additional accounts.
 - Each primary user completes & signs Form SPO-040
 - indicating that they will maintain security and attend required training. (There are [instructions](#) for form SPO -040. Read before completing.)
 - Form is signed and submitted only by Accounts Mgr.

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Requiring An Account (Login/password)

- **For Notices and Solicitations:**
 - Procurement Notices *
 - Health and Human Service RFPs**
 - HePS***
- **For Awards**
 - All awards except professional services** (HRS 103D and 103F)
 - Professional Services*
- **Hawaii Compliance Express**
- **Questions?**
 - HRS 103D Wendy Orita (and any HCE questions)
 - HRS 103F Corinne Higa (and training questions)

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2 Systems Same Login

- When the procurement notices for solicitations site and the professional awards site were compromised this year, we anticipated it would now move to all one system.
- But that was not to be...yet.

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PANS Users have 2 different accounts

- One account
 - Professional Services Awards; and
 - Procurement Notices of Solicitation
 - SPO established login (User ID) and password,
 - User may change the password after logging in.
- One account
 - Awards and
 - Health and Human Service RFPs
 - SPO established login (user ID) -system asks the user to establish a new password.
- It is possible to have the same login (user ID) and 2 different passwords.

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How to Make the Passwords the Same

- For awards reporting and Health and Human Services RFP:
 - Log in.
 - Look at the lower right menu.
 - Select change password.
- For Procurement Notices of Solicitations and Professional Services Awards:
 - **reset** your password.

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Accounts for HePS

- **Hawaii eProcurement System**
 - In order to have access, the following is required:
 - [Delegated Authority](#) (Form SPO-36)(Complete for method of procurement and HePS)
 - Taken [all required workshops](#)
 - Access is given by your **department HePS Administrator**, not SPO.
 - Questions about HePS?
 - **Contact Your HePS Department Administrator!**
 - Mara Smith
 - Wendy Orita
 - Bonnie Kahakui

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Sites Requiring a Login/Password Additional Info – De-Activation

- Deactivation upon notification by Department /Jurisdiction Accounts Managers
- (Generally –we don't want to de-activate –instead change the user
- **HePS**
 - No login for one year, or no procurements for two years, Deactivation by your Dept/Jurisdiction HePS Administrators.

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Procurement Notices for Solicitation

- <http://hawaii.gov/spo>
- This site has changed on the public view. Direct vendors to <http://hawaii.gov/spo> > **Procurement Notices**.
- Solicitations for IFBs conducted on HePS are not manually entered. HePS posts automatically, but only for solicitations (not for awards).
- To log in to post solicitations that are not on HePS, Go to the public procurement notices, page and select **Procurement Notices for Solicitations**. Or go to: <http://hawaii.gov/spo/notices>
- Once on that page, on the lower right hand corner you will see **Log in**. It is next to *Terms of Use*. Select *Log in*.

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Procurement Notices

continued

- You may enter all info prior to the official posting date, it will automatically post on the date you indicate.
- Enter contact person, phone number, e-mail.
- Attached 'legal ad' format **must** be .htm or .txt.
- If attaching a copy of the solicitation, format must be .pdf.
- Print copy of the notice **from the website on the first day it is advertised!** Complete attestation.
- Keep description concise and to the point.

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Procurement Notices for Solicitation What Must be Posted

- Competitive Sealed Bids
- Competitive Sealed Proposals
- Professional Services
- Requests for Interest for Federal Grants
- Multi-step Competitive Sealed Bids
- Requests for Information
- Requests for Proposals for Health and Human Services

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Procurement Solicitation Notices Tips

- Check the public site after uploading.
- Print the notice.
- If you wish to include Attachments, they should not be too large. (2-4 mg). If your document is larger, break it into parts.
- You may not have 2 files with the same name in each solicitation notice.

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Procurement Solicitation Notices Do's and Don'ts

- **Don't enter this:** The State of Hawaii, Department of Transportation, Division of Accounting, is requesting...
 - Too long- no one wants to read it
- **Do this-examples of acceptable entries:**
 - Bridge repair for the XX bridge...
 - Repair roofing at Kuhio Park Terrace.
 - Services to assist small businesses in applying for XXX federal grant program...

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Procurement Solicitation Notices Conducted on HePS

- Do not post manually on the Procurement Notices website. Once you have entered your solicitation in HePS, it will be posted automatically. For small purchases posted when open to all registered vendors
- Public site for HePS procurement Notices:
 - From Quicklinks: Procurement Notices > Procurement Notices for Hawaii eProcurement Solicitations
- To print a copy of the notice, use the search to find your solicitation and print.

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Procurement Notices for Solicitations Resources

- Use the [Procurement Notices for Solicitations Quick Reference](#)
 - For State and County Procurement Personnel
 - Posting Procurement Awards, Notices, and Solicitations (PANS)
 - Toolbox
 - Procurement Notices for Solicitations Quick Reference

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Hawaii Compliance Express (HCE)

- <http://hawaii.gov/spo>
click **Hawaii Compliance Express**
- Government Employees can obtain access to HCE at no cost. Refer to FAQ...
- “Real Time” basis.
- Non-compliant vendor’s should contact the respective department to obtain compliance. (Not SPO)
- Substituted for tax clearance, labor cert., and COGS per HAR section 3-122-112.
- Allow for 10 working days for compliance status when first signing up.
- To obtain an account as a procurement personnel, create an account **using your work e-mail**. Send request to email indicated in Procurement Circular 2005-04 Amendment 3. Note: This process may be changing. Stay tuned.

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Hawaii Compliance Express (HCE)

- If vendor is registered in HCE, it is the responsibility of the purchasing agency to log in, verify compliance and print the certificate.
 - Reference: Procurement Circular 2005-04, Amendment 3
- **Note:** If procuring on HePS, system will interface with HCE and obtain the compliance information when you select the award button.
- Reference:
 - HRS Section 103D-310
 - HAR Section 3-122-112
 - Procurement Circular 2005-04 and amendments 1-3

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Conditions under which

Proof of Compliance is Required

- Proof of Compliance is required for the following Methods of Procurement:
 - Competitive Sealed Bid/Invitation for Bid (IFB);
 - Competitive Sealed Proposal/ Request for Proposal (RFP);
 - Professional Services;
 - Sole Source; **and**
 - Small Purchases of \$2,500 and above*

**Reference, Act 190, SLH 2011*

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Proof of Compliance Required Before Award

- You do not want this to happen to you:
 - Vendor is given the notice to proceed.
 - Vendor cannot get the compliance documentation.
 - You, representing the state have authorized delivery.– Vendor is due his pay.
 - Vendor cannot be paid due to non-compliance.
 - Result:
 - Procurement Violation; and
 - Possible Administrative fine.

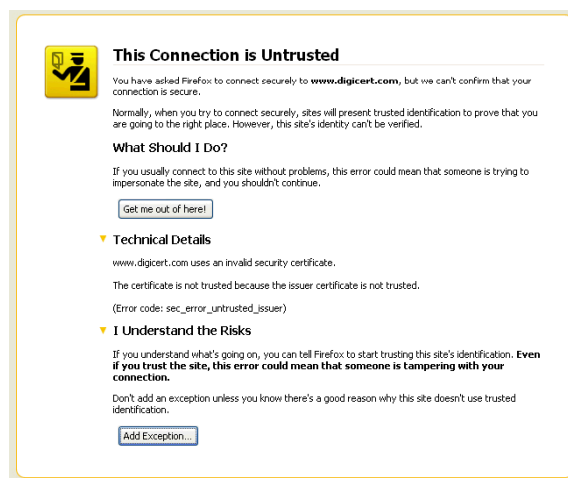
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Posting Awards

- <http://hawaii.gov/spo>
- **For State and County Procurement Personnel > Posting Procurement Awards, Notices & Solicitations.**
- On the website: Detailed instructions/manuals Procurement Circulars, Quick Reference, data entry forms, etc.
- The system records date posted and the most recent date it was saved(updated), you cannot change them.
- Users may only access awards posted by the user (login/password).

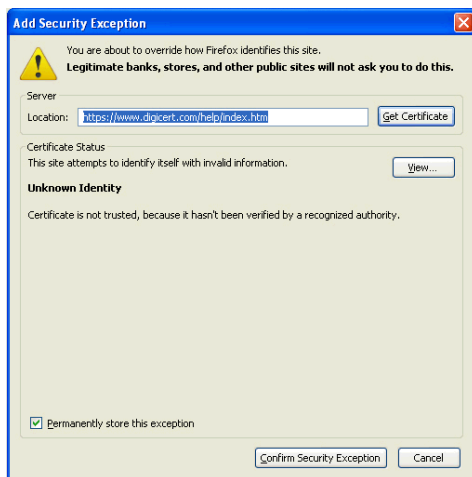
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When you first log in ... You May See Some Security Screens



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-Security - Confirm Security Exception



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Security for Posting Awards Click 'Yes'



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Awards that Must be Reported

Procurement Method	Dollar Thresholds	No. of Days of Award within which it must be Reported
Competitive Sealed Bids	All awards	7
Competitive Sealed Proposals	All awards	7
Small Purchases	\$15,000 and above	7
Sole Source	\$2,500 and above	7
Emergency	\$2,500 and above	7

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Awards Reporting System

Other Awards that Must be Reported

What Must be Reported	Conditions Requiring Entry in Awards Reporting Site	No. of Days of Award within which it must be Reported
Exemptions from HRS Chapter 103D	Awards \$2,500 and over	7
Amendments, extensions, change orders	Whenever the change affects: •Contract Term •Contract Amount	7

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Purchases that Should Not be Posted

- Purchases from SPO Price/Vendor Lists.
- Payments to/on behalf of employees for salaries, fringe benefits, professional fees, reimbursements.
- Payments to satisfy obligations the State must pay: such as fees, settlements, subsidies, refunds, etc.
- Dues and fees of organizations in which the state or its officers/employees are members.
- Entitlement programs established by federal law (public, assistance, unemployment, workers comp, etc.)

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Awards that Should Not be Posted *(continued)*

- Utilities whose prices are regulated.
- Interisland airfare under current SPO exemption.

Note: This listing is not complete. Check the handbook for a complete listing.

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Tips on Entering Data

- Complete all fields!
- Enter a brief but informative description in the description field.
- Remember open and transparent.
 - Do NOT use parens, commas, semi-colons, colons, etc or acronyms in the description field.
- **Important:** Review your entry on the public site to ensure it is correct.

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Awards Reporting Do's and Don'ts

- Entries that are not acceptable in the description field:
 - RFP-ADR-06-22
(Do not only enter the RFP number)
 - Consulting Services
(Consulting services for what?)
 - Leaving the description field blank
 - “Year two of maintenance agreement...” (Is this part of another contract? An improper procurement?)

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Tips on Entering Data: Funding Amount Fields, Amendments

- In original amount, enter an **estimate** of the total amount to be expended if the contract is not a fixed price contract.
- When contract ends, enter the amount actually expended in the **final expended amount** field.
- Amendment Amount: the amount of the change to the original award in the amendment, not the total contract amount. Amendment increases award by \$28,000, enter 28000 as the amendment amount.

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Supplemental Agreements

- Supplemental Agreements are not to be entered as separate contracts/awards. They are amendments.

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Awards for Professional Services Method of Procurement

- <http://hawaii.gov/spo>
 - >Awards
 - >Awards for Goods, Services and Construction
 - > Professional Services Awards
- Or <http://hawaii.gov/spo/psa>
- Detailed instructions are on the PANS Toolbox site.
- The system records date posted, you cannot change it.
- Users may only access awards uploaded by the user (login/password).
- This is part of the same system as Procurement Notices for Solicitations.
- Previous awards are on the site but cannot be accessed.

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Professional Services Awards What Awards Must be Posted

- All awards of \$5,000 and greater procured pursuant to HRS Chapter 103D-304 Professional Services
- Must be posted no later than **7** days of date of award.
- Data remains on website for at least 40 months. Will automatically be removed. Do NOT delete.

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Professional Services Awards
Award Information that Must be Posted

- Names of applicants submitted to the head of the purchasing agency;
- Awardee name;
- Contract dollar amount;
- Name of the head of the purchasing agency or designee making the selection;
- Any relationship of the principals to the official making the award.
- Names of review and selection committee members.**
 - Reference HRS Section 103D-304(i)
(**Mandatory for Executive Branch. Required by CPO.)

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Useful Info on the SPO Website

<http://hawaii.gov/spo>

- [For State and County Procurement Personnel](#)
(bookmark this site)
 - Posting Procurement Awards, Notices and Solicitations
- Forms
- Information on Methods of Procurement and Online Procurement Manuals
- [Awards Public Site](#)
- Price and Vendor Lists
- Travel Services
- Inventory Management and Excess Property
- pCard Information
- Training for State and County Procurement Personnel
- Procurement References
 - [Hawaii Revised Statutes & Hawaii Administrative Rules](#)
 - Procurement Circulars

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New SPO Website is Coming

- Check **What's New** on the SPO homepage or Procurement Circulars.
- We will hold a webinar Informational Session when it is launched.
- The URL (address) of the SPO homepage will remain the same.
- Many of the other SPO pages will change; you will need to reset your favorites/links for some SPO webpages.
- If you need to find something click **For State and County Personnel**.
- Some pages that will remain the same (URL will not change):
 - Procurement Circulars and Procurement directives
 - Awards Posting Site
 - Price and Vendor List contracts
 - Posting site for Procurement Notices for Solicitations
- The HePS site is **not** affected.
- The HePS section in the SPO website **is** affected.

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New SPO website

- Menu in Header (appears on every page)
 - **Doing Business with the State**
 - (Direct vendors here)
 - **For State and County Personnel**
 - Bookmark this page
 - **Contact**
 - Contact info for specific topics and staff contact information

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SPO New Website Right Sidebar

- **Information**
 - Solicitation notices
 - Awards
- **Toolbox**
 - SPO Forms, AG Contract Forms
 - HCE
 - Additional info depending on location in the SPO website
- **Reference**
 - Statutes and Administrative Rules

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Comparing the Current and Upcoming New SPO Website

Current SPO Website	New SPO Website
http://hawaii.gov/spo	http://hawaii.gov/spo
For State and County Procurement Personnel (left sidebar)	For State and County Personnel (header menu)
PANS - For State and County Procurement Personnel > PANS	PANS - For State and County Personnel > PANS
Procurement Notices (right sidebar)	Procurement Notices for Solicitations (right sidebar and center section)
Awards (center section)	Contract Awards and Info (right sidebar) (also center section on home page)
Health and Human Services	For State and County Personnel/ Health and Human services
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State Procurement Office

<http://hawaii.gov/spo>

The End

- Questions?
 - Visit the Website
 - Contact SPO

Mara Smith 587-4704 mara.smith@hawaii.gov

Wendy Orita 586-0563 wendy.m.orita@hawaii.gov

Bonnie Kahakui 587-4702 bonnie.a.kahakui@hawaii.gov

Corinne Higa 587-4706 corinne.y.higa@hawaii.gov

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State Procurement Office

Contacts for General and Specific Info

- **Donn Tsuruda-Kashiwabara** 586-0565
donna.tsuruda-kashiwabara@hawaii.gov
RFPs, specifications, emergency, sole source, prof. svcs., exemptions
- **Mara Smith** 587-4704
mara.smith@hawaii.gov
HePS, Awards Reporting System, SPO website (general),
- **Kevin Takaesu** 586-0568
kevin.s.takaesu@hawaii.gov
IFBs, Preferences, emergency, sole source, prof. svcs., exemptions
- **Bonnie Kahakui** 587-4702
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Travel, pCard, emergency, sole source, prof. svcs., exemptions, HePS
- **Wendy Orita** 586-0563
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Hawaii Compliance Express (HCE), Price and Vendor lists, HePS
- **Stanton Mato** 586-0566
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Delegated Procurement Authority, Price and Vendor Lists
- **Corinne Higa** 587-4706
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Health & Human Services (all procurement methods), Training